

CBAS File Drop Web Portal Training Module

Presented By: CDA CBAS Branch

Date: June 16, 2017

Overview

Internet-based application

- Works with all web browsers, including mobile devices
- Encrypted to meet HIPAA compliance standards

Submission Process Overview

- CDA will notify providers via email of submission requirement
 - July 1 and January 1
- Providers will log in to the CBAS File Drop Web Portal
 - Select and upload an Excel PCR file
- CDA will analyze PCR submissions for data accuracy and quality
 - CDA staff will contact center staff for clarifications

Submission Process Overview

- If PCR is approved, an email indicating that no further action is required will be generated
- If PCR is not approved, an email indicating that a need for resubmission will be generated

Submission Required Notification

ACTION REQUIRED: Participant Characteristics Report (PCR) (CDA CBAS 293) Submission

cbascda@aging.ca.gov

Sent: Thu 6/8/2017 11:07 AM

To: Smith, Adam@CDA

Cc: CBAS@CDA

ACTION REQUIRED: Participant Characteristics Report (PCR) (CDA CBAS 293) Submission

The next PCR submission for Sample CBAS Center is **due to CDA by 07/31/2017**.

- PCR for the enrollment period of June 1 – 30, 2017, is due to CDA by July 31. The PCR should not include any participants enrolled after June 30.
- PCR for the enrollment period of December 1 - 31, 2017, is due to CDA by January 31. The PCR should not include any participants enrolled after December 31.

The current reporting forms, training, and other reference materials are posted on the CDA website under CBAS Forms and Instructions.

Access the CDA CBAS website at:

www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/

Contact CDA at:

Email – CBAScda@aging.ca.gov

Phone – (916) 419-7545

DO NOT REPLY TO THIS EMAIL. THIS IS AN AUTOMATED SERVICE AND RESPONSES WILL NOT BE MONITORED.

CBAS File Drop Web Portal

- Accessed via direct link
 - <https://cbasfiledrop.aging.ca.gov/>
- The CBAS forms webpage
 - http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting_Requirements/

♦ **Participant Characteristics Report (PCR) (CDA CBAS 293) (Rev 06/16)**
See reporting guidelines table below.


- ♦ PCR 
- ♦ PCR Instructions 
- ♦ PCR Training 
- ♦ FAQ 
- ♦ PCR Submission Checklist 

CBAS File Drop Web Portal

- ♦ CBAS File Drop Web Portal Instructions 
- ♦ CBAS File Drop Web Portal Training 
 - ♦ CBAS File Drop Web Portal Training Webinar Recording 
- ♦ Account Action Request 

Submit Your PCR

Log Into the CBAS File Drop Web Portal



User Credentials

Username

Password

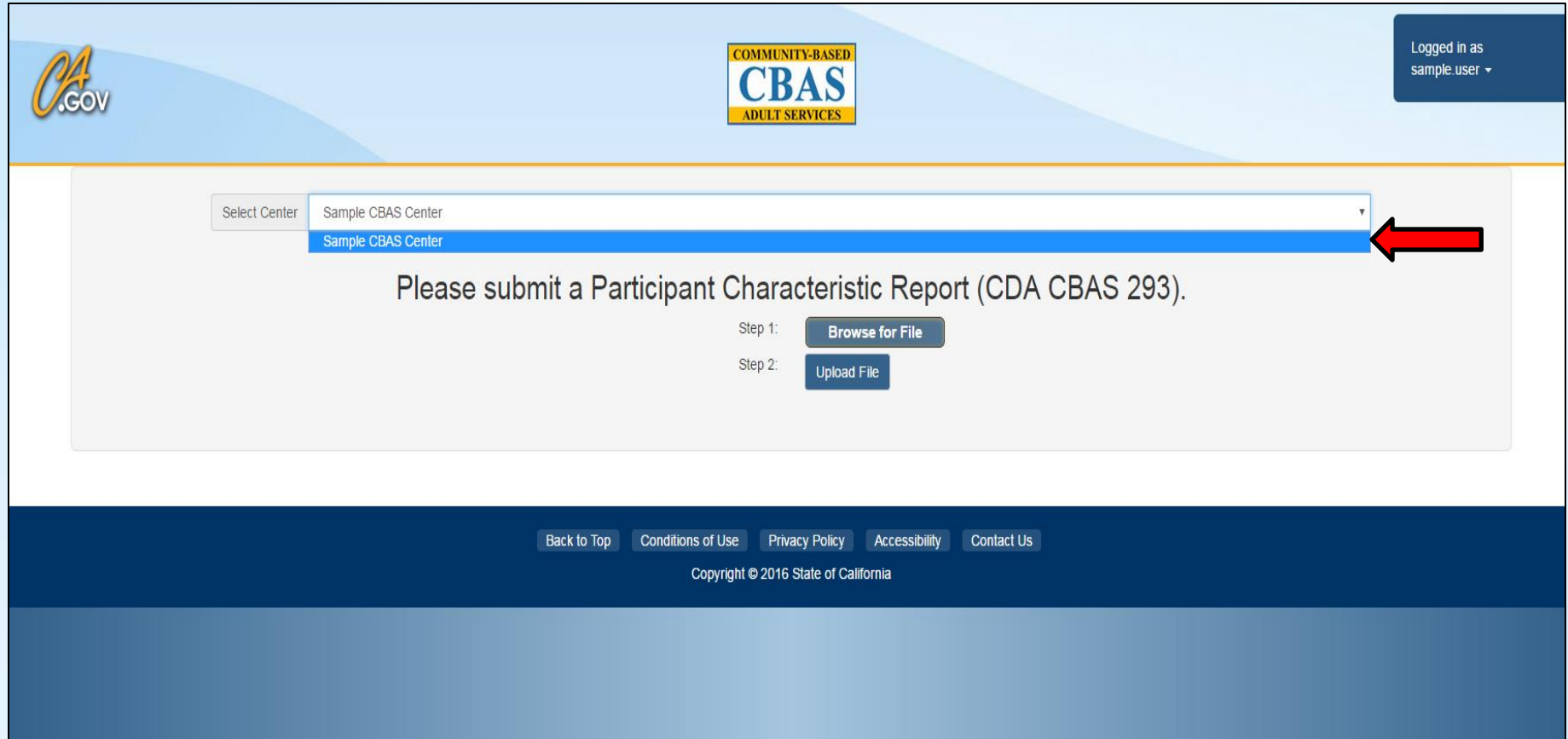
[Forgot My Password](#)

Login

[Back to Top](#) [Conditions of Use](#) [Privacy Policy](#) [Accessibility](#) [Contact Us](#)

Copyright © 2016 State of California

Select Center from Dropdown



The screenshot displays the CBAS Adult Services web application interface. At the top left is the CA.GOV logo. In the center is the COMMUNITY-BASED CBAS ADULT SERVICES logo. At the top right, a dark blue box indicates the user is "Logged in as sample.user". Below the header, a "Select Center" dropdown menu is open, showing "Sample CBAS Center" as the selected option. A red arrow points to the dropdown arrow icon. Below the dropdown, the text "Please submit a Participant Characteristic Report (CDA CBAS 293)." is displayed. Underneath this text, there are two steps: "Step 1: Browse for File" and "Step 2: Upload File". At the bottom of the page, there are links for "Back to Top", "Conditions of Use", "Privacy Policy", "Accessibility", and "Contact Us", followed by the copyright notice "Copyright © 2016 State of California".

CA.GOV

COMMUNITY-BASED
CBAS
ADULT SERVICES

Logged in as sample.user ▾

Select Center Sample CBAS Center ▾

Sample CBAS Center

Please submit a Participant Characteristic Report (CDA CBAS 293).

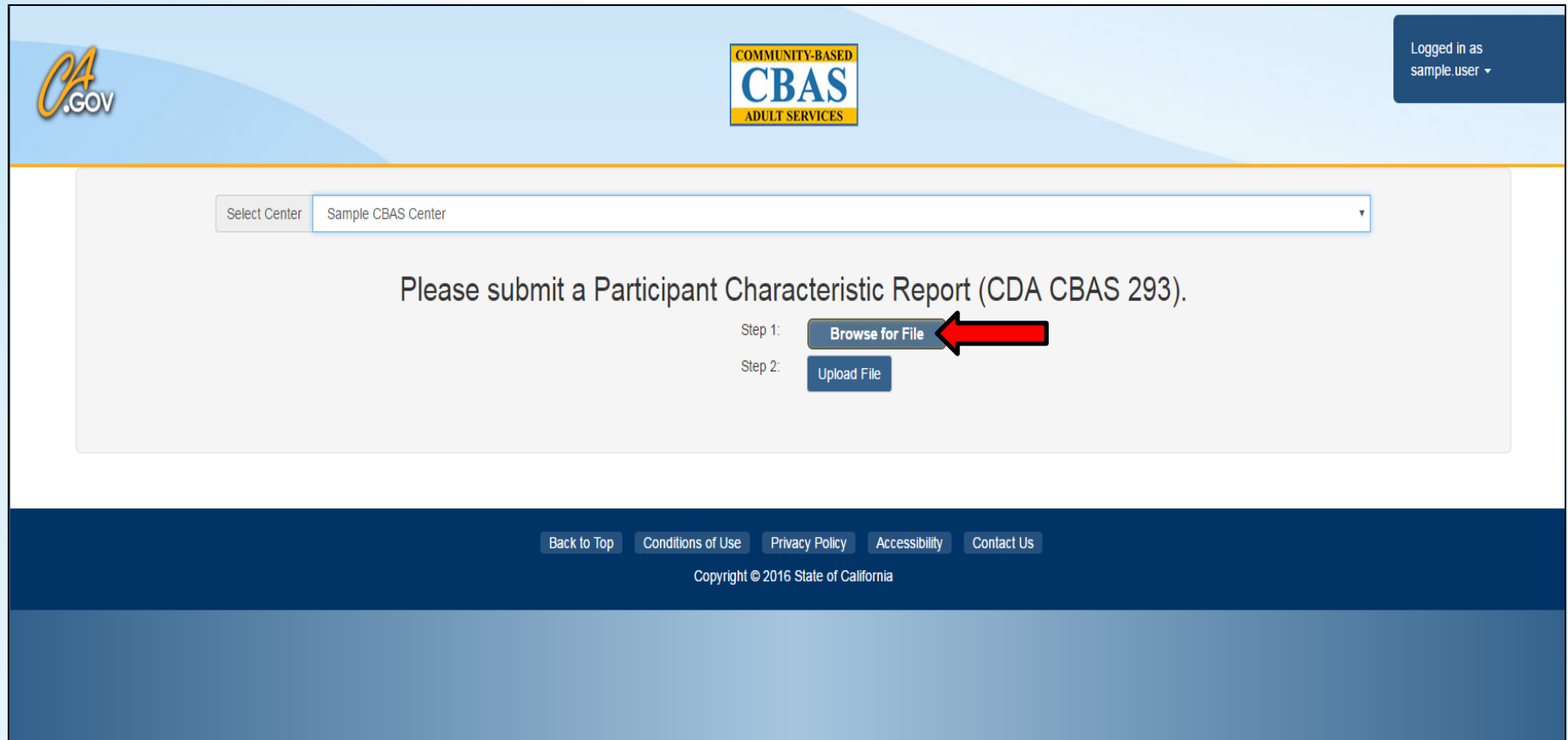
Step 1: [Browse for File](#)

Step 2: [Upload File](#)

[Back to Top](#) [Conditions of Use](#) [Privacy Policy](#) [Accessibility](#) [Contact Us](#)

Copyright © 2016 State of California

Click “Browse for File”



The screenshot shows the CBAS Adult Services web application. At the top left is the CA.GOV logo. At the top center is the COMMUNITY-BASED CBAS ADULT SERVICES logo. At the top right, a dark blue box indicates the user is logged in as 'sample.user'. Below the header, there is a 'Select Center' dropdown menu with 'Sample CBAS Center' selected. The main content area has a light gray background and contains the text 'Please submit a Participant Characteristic Report (CDA CBAS 293)'. Below this text, there are two steps: 'Step 1: Browse for File' and 'Step 2: Upload File'. A red arrow points to the 'Browse for File' button. At the bottom of the page, there is a dark blue footer with links for 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us'. Below these links is the copyright notice 'Copyright © 2016 State of California'.

CA.GOV

COMMUNITY-BASED
CBAS
ADULT SERVICES

Logged in as sample.user ▾

Select Center Sample CBAS Center ▾

Please submit a Participant Characteristic Report (CDA CBAS 293).

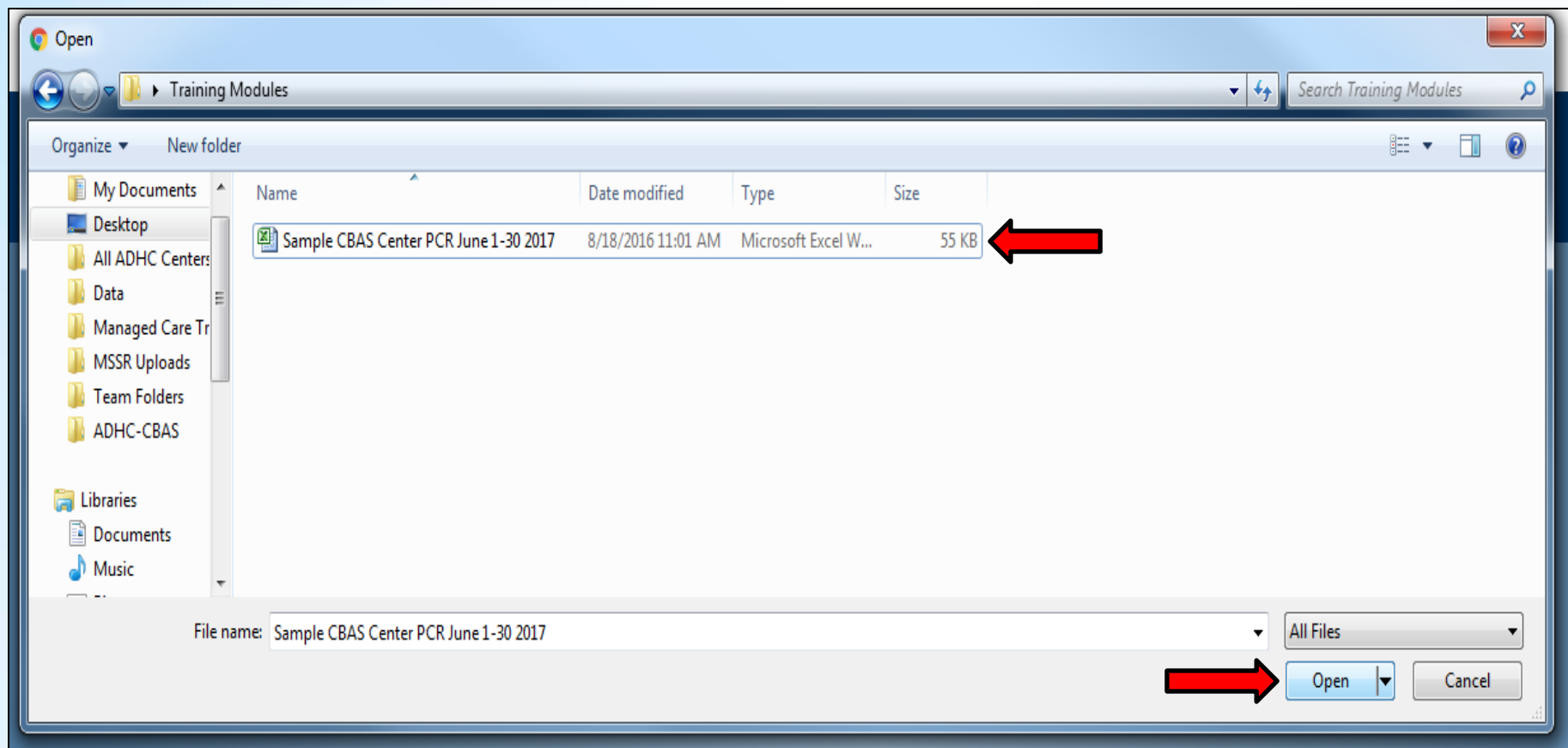
Step 1: **Browse for File**

Step 2: Upload File

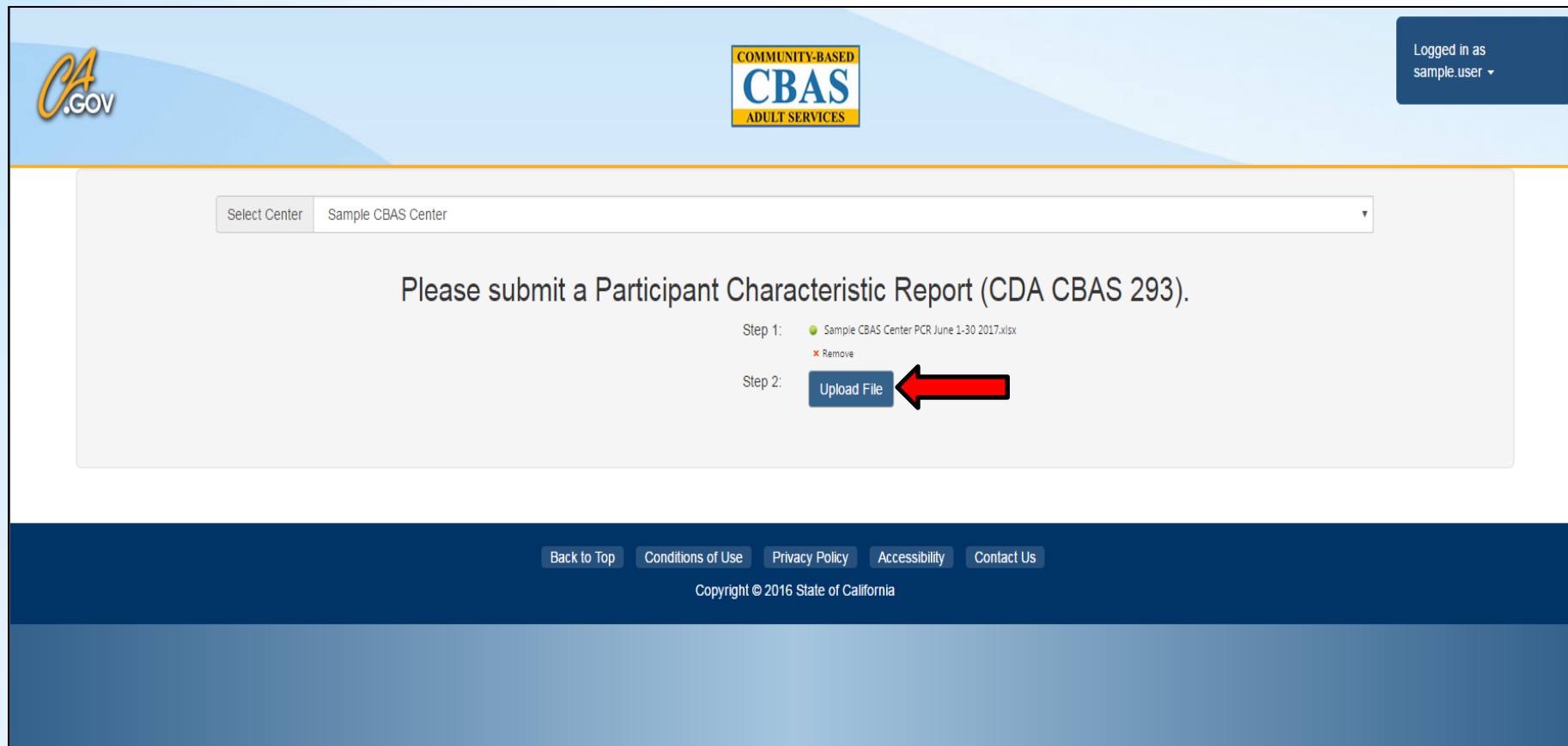
Back to Top Conditions of Use Privacy Policy Accessibility Contact Us

Copyright © 2016 State of California

Select File



Click “Upload File”



The screenshot shows the CBAS Adult Services web application. At the top left is the CA.GOV logo. At the top center is the COMMUNITY-BASED CBAS ADULT SERVICES logo. At the top right, a dark blue box indicates the user is logged in as 'sample.user'. Below the header, there is a dropdown menu labeled 'Select Center' with 'Sample CBAS Center' selected. The main content area has a light gray background and contains the text 'Please submit a Participant Characteristic Report (CDA CBAS 293)'. Below this text, there are two steps: 'Step 1: Sample CBAS Center PCR June 1-30 2017.xlsx' with a green dot and 'Remove' link, and 'Step 2: Upload File' with a blue button. A large red arrow points to the 'Upload File' button. At the bottom, there is a dark blue footer with links for 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us', and a copyright notice for 2016 State of California.

CA.GOV

COMMUNITY-BASED
CBAS
ADULT SERVICES

Logged in as
sample.user ▾

Select Center Sample CBAS Center ▾

Please submit a Participant Characteristic Report (CDA CBAS 293).

Step 1: ● Sample CBAS Center PCR June 1-30 2017.xlsx
✕ Remove

Step 2: Upload File

[Back to Top](#) [Conditions of Use](#) [Privacy Policy](#) [Accessibility](#) [Contact Us](#)

Copyright © 2016 State of California

File is Received



Logged in as sample.user ▾

Select Center Sample CBAS Center ▾

Please submit a Participant Characteristic Report (CDA CBAS 293).

The following file has been previously uploaded:

Uploaded: 6/8/2017 11:16:29 AM

Filename: Sample CBAS Center PCR June 1-30 2017.xlsx



If you upload a new file, the file will get replaced.



Step 1:

Browse for File

Step 2:

Upload File

If You Would Like to Overwrite File




Logged in as
sample.user ▾

Select Center Sample CBAS Center ▾

Please submit a Participant Characteristic Report (CDA CBAS 293).

The following file has been previously uploaded:
Uploaded: 6/8/2017 11:16:29 AM
Filename: Sample CBAS Center PCR June 1-30 2017.xlsx

If you upload a new file, the file will get replaced.

Step 1: **Browse for File** 

Step 2: **Upload File**

Back to Top

Conditions of Use

Privacy Policy

Accessibility

Contact Us

Copyright © 2016 State of California

Once PCR is Under Review by CDA



The screenshot shows the CBAS web application interface. At the top left is the **CA.GOV** logo. In the center is the **COMMUNITY-BASED CBAS ADULT SERVICES** logo. At the top right, a dark blue box indicates the user is "Logged in as sample.user". Below the header is a light gray box containing a dropdown menu labeled "Select Center" with "Sample CBAS Center" selected. In the center of this box, the text "No PCR submission is required at this time." is displayed. At the bottom of the interface is a dark blue footer bar with links for "Back to Top", "Conditions of Use", "Privacy Policy", "Accessibility", and "Contact Us". Below these links, the copyright notice "Copyright © 2016 State of California" is visible.

Approved Notification Email

From: cbascda@aging.ca.gov
To: Smith, Adam@CDA
Cc: CBAS@CDA
Subject: Information Only: PCR Approved

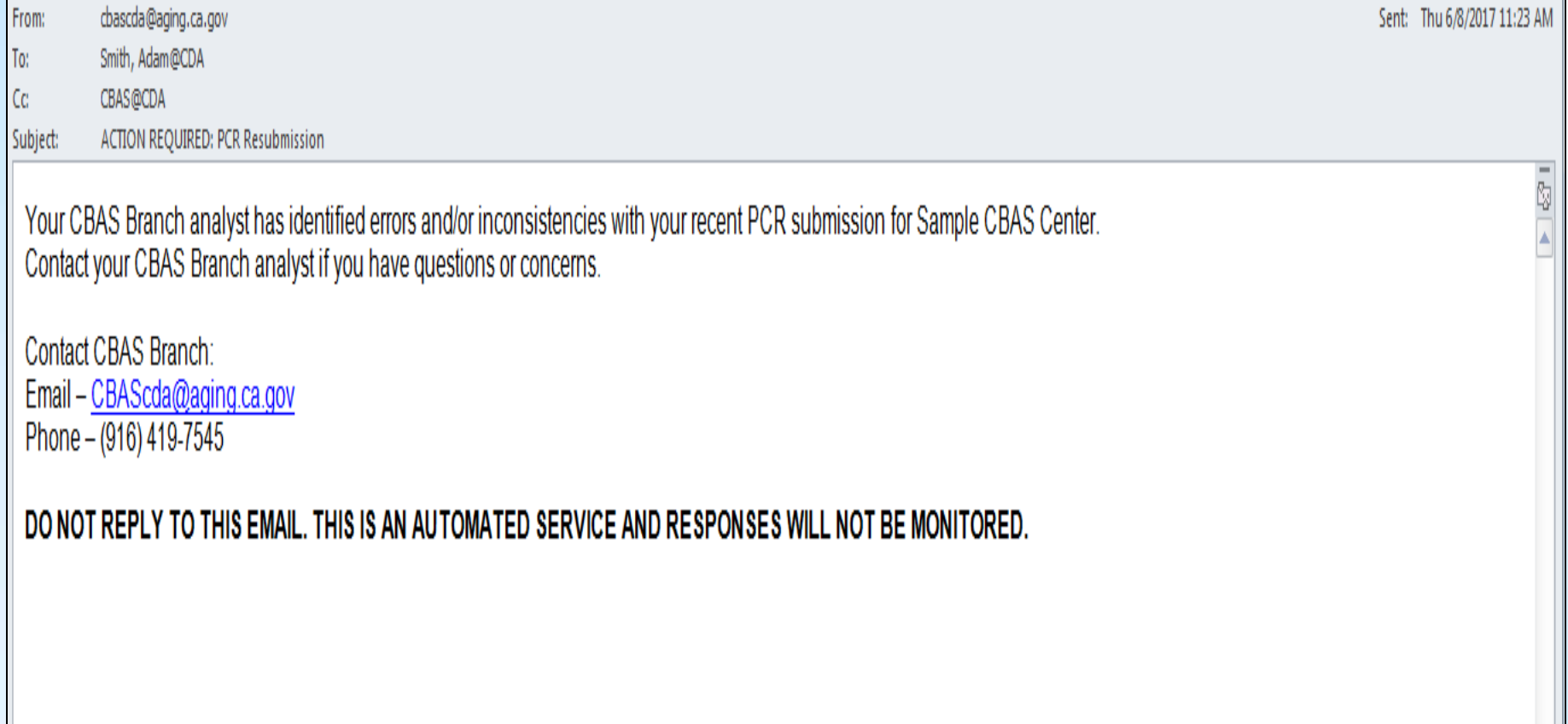
Sent: Thu 6/8/2017 11:31 AM

No Further Action is required for Sample CBAS Center.
Contact your CBAS Branch analyst if you have questions or concerns.

Contact CBAS Branch:
Email – CBAScda@aging.ca.gov
Phone – (916) 419-7545

DO NOT REPLY TO THIS EMAIL. THIS IS AN AUTOMATED SERVICE AND RESPONSES WILL NOT BE MONITORED.

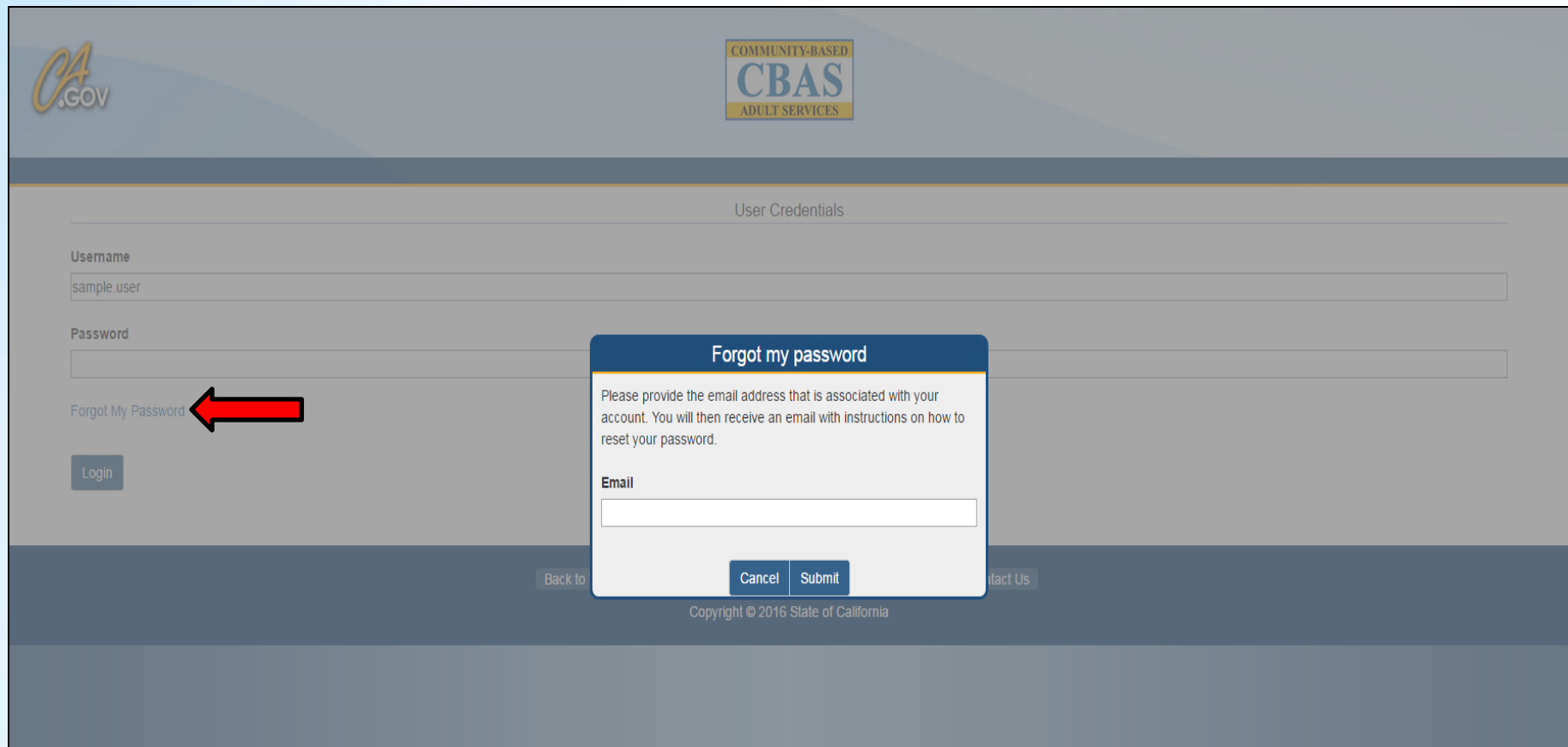
Not Approved Notification Email



Forgot Your Password

- No need to contact CDA
- Navigate to the CBAS File Drop Web Portal webpage
 - Click “Forgot My Password”
 - Enter your email address that is associated with your account
 - An email will be sent to you with a link to change your password

Forgot Your Password



The screenshot shows the login interface for the Community-Based Adult Services (CBAS) system. At the top left is the CA.GOV logo, and at the top center is the CBAS ADULT SERVICES logo. The main section is titled 'User Credentials' and contains two input fields: 'Username' (with the text 'sample.user') and 'Password'. Below these fields are two links: 'Forgot My Password' and 'Login'. A red arrow points to the 'Forgot My Password' link. A modal window titled 'Forgot my password' is open in the center, containing the text: 'Please provide the email address that is associated with your account. You will then receive an email with instructions on how to reset your password.' Below this text is an 'Email' input field and two buttons: 'Cancel' and 'Submit'. At the bottom of the page, there are links for 'Back to' and 'Contact Us', and a copyright notice: 'Copyright © 2016 State of California'.

CA.GOV

COMMUNITY-BASED
CBAS
ADULT SERVICES

User Credentials

Username
sample.user

Password

Forgot My Password

Login

Forgot my password

Please provide the email address that is associated with your account. You will then receive an email with instructions on how to reset your password.

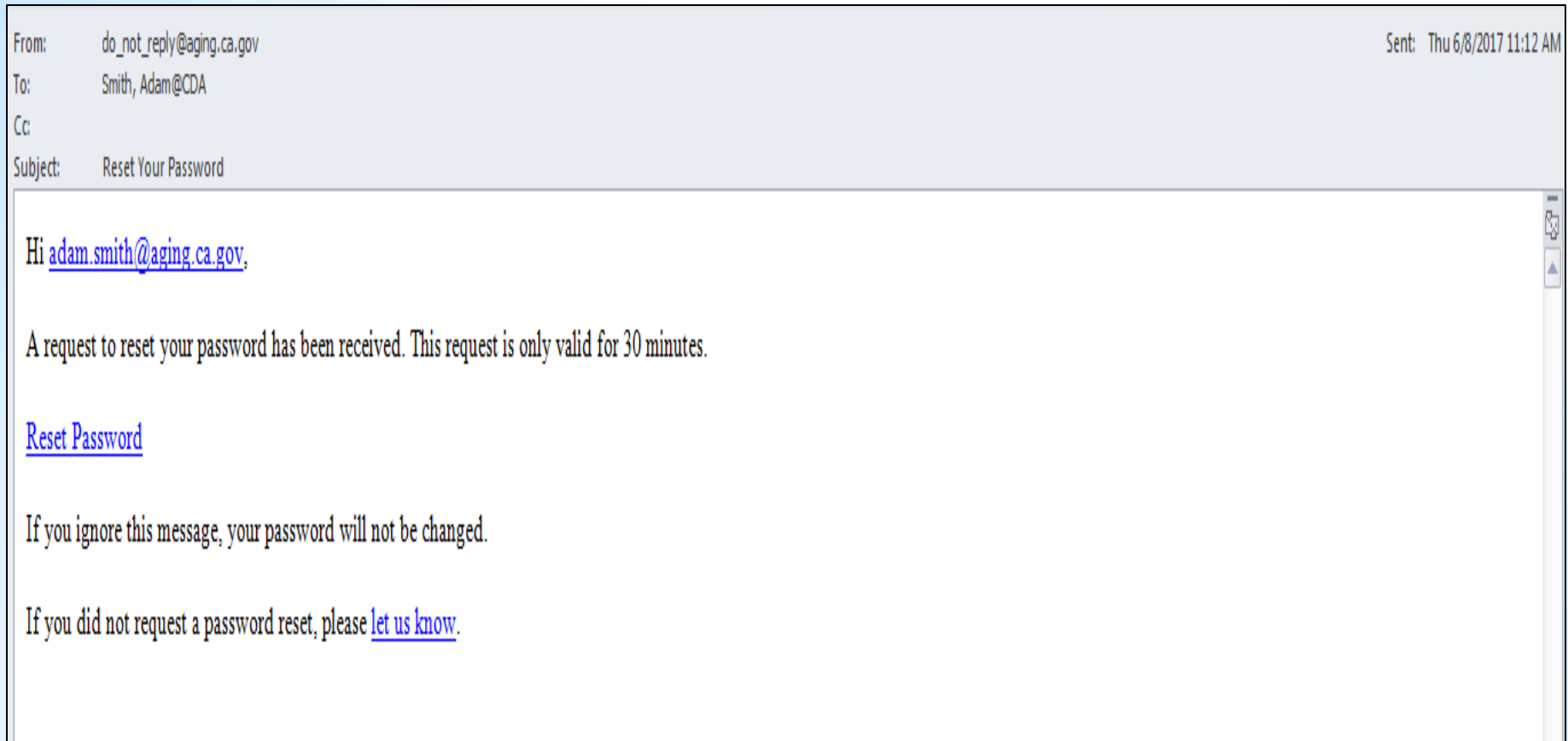
Email

Cancel Submit

Back to Contact Us

Copyright © 2016 State of California

Forgot Your Password



Changing Your Password

- No need to contact CDA
- Log into the CBAS File Drop Web Portal
 - Go to My Account
 - Click Change password
 - Follow the on-screen guidelines for password formats

Changing Your Password

CA.GOV

COMMUNITY-BASED
CBAS
ADULT SERVICES

Logged in as sample.user ▾

My Account

Logout Manage your account

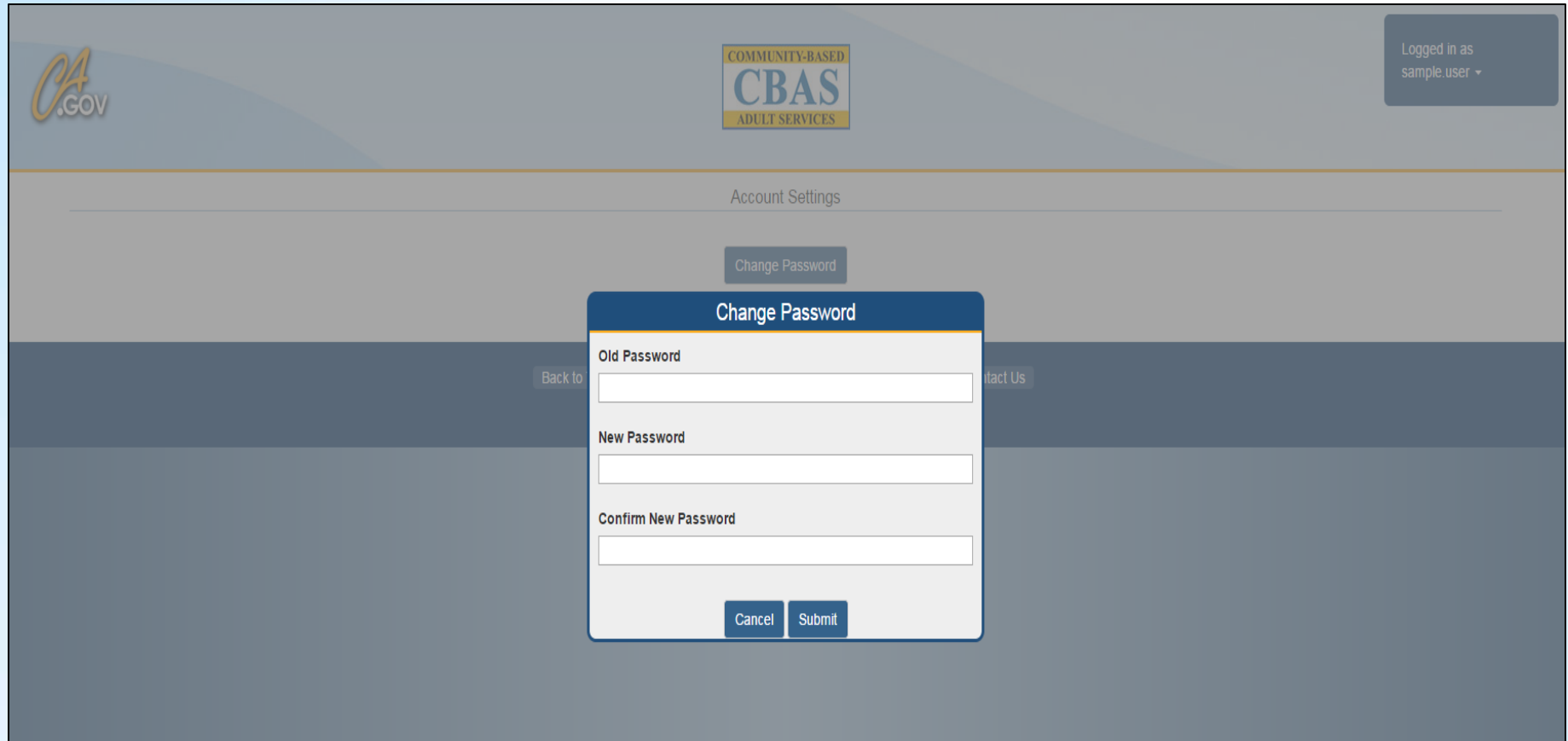
Select Center Sample CBAS Center ▾

No PCR submission is required at this time.

Back to Top Conditions of Use Privacy Policy Accessibility Contact Us

Copyright © 2016 State of California

Changing Your Password





The screenshot shows a web interface for 'COMMUNITY-BASED CBAS ADULT SERVICES'. In the top right corner, it says 'Logged in as sample.user'. The main content area is titled 'Account Settings' and contains a 'Change Password' button. A modal window titled 'Change Password' is open in the center. It contains three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. The background is a light gray with a blue header and footer.

Passwords must be 8-30 characters long, and contain at least three of the following attributes:
Uppercase letter, Lowercase letter, Number, Special character (!, @, #, \$, %, ^, &, *, ?, _, ~, -, ., ,)

Account Updates

- Complete the CBAS File Drop Account Action Request Form
 - http://www.aging.ca.gov/ProgramsProviders/ADHC-CBAS/Forms/Reporting_Requirements/
- Submit to CBAS Branch general email
 - cbascda@aging.ca.gov
- CDA will confirm via email once changes have been made

Account Action Request Form

	CBAS FILE DROP WEB PORTAL ACCOUNT ACTION REQUEST	
SECTION A. Center Information		
<input type="checkbox"/> New User Account <input type="checkbox"/> Disable User Account <input type="checkbox"/> Changes to Existing Accounts		
Center Name:		
NPI:		
SECTION B. New User Account		
Name:		
Title:		
Email address:		
SECTION C. Disable User Account		
Name:		
SECTION D. Change(s) to Existing Accounts		
Current User Name:		
Current Email address:		
Type of Change:	<input type="checkbox"/> Email Address <input type="checkbox"/> Name Change <input type="checkbox"/> Center Employment <input type="checkbox"/> Other (specify): _____	
Change:		
ACCOUNT ACTION REQUEST (Rev 06/17)		

CDA Contact Information

CDA on the Web	www.aging.ca.gov
Addresses	California Department of Aging CBAS Branch 1300 National Drive, Suite 200 Sacramento, CA 95834 cbascda@aging.ca.gov
Phone	(916) 419-7545